

FORMAX[®]

MailDocTM
Beginner 

INSTALLATION / SETUP GUIDE
SECOND EDITION

MailDocTM Beginner

for Microsoft Windows

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FORMAX, Publisher

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INSTALLATION

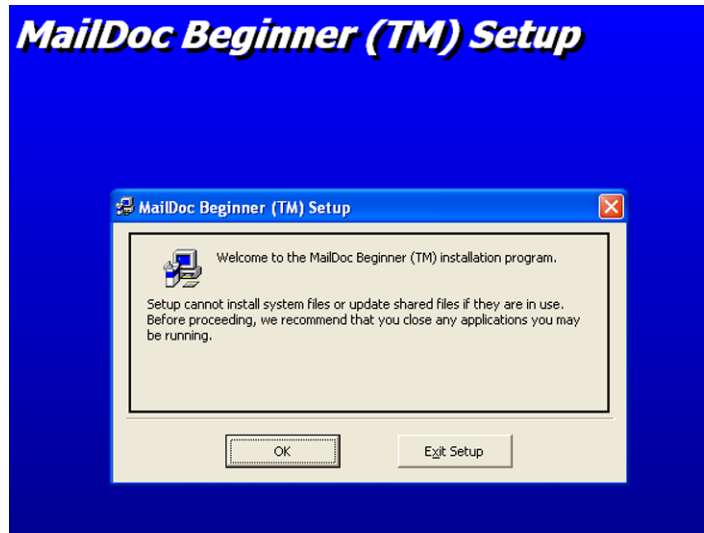
System Requirements

PC Hardware	Software
Pentium 2GHz PC with 1 GB RAM or higher	Works with any Windows® compatible printer (Prints to multiple printers with single license)
4 GB free hard disk space	Pre formatted print data only in PDF format
CD-ROM	PDF Reader
Windows 2000 OS or higher	Java Runtime

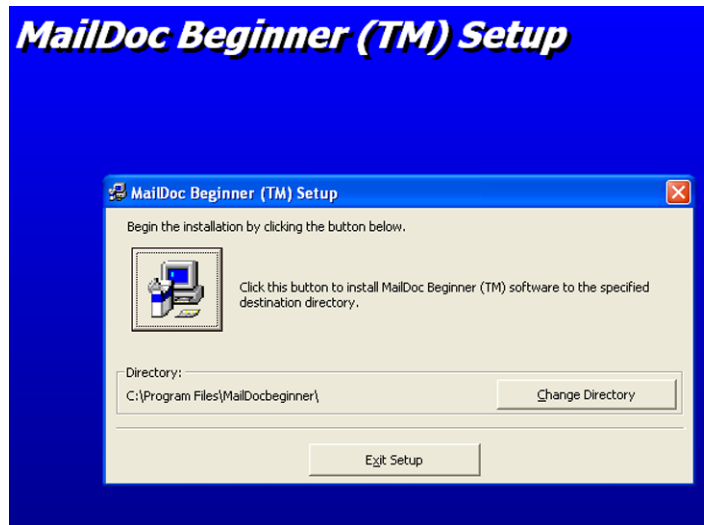
* One PC per license, if MailDoc is activated on a 2nd PC with the same activation code MailDoc will be deactivated on the initial PC.

* Internet Connectivity required to operate program

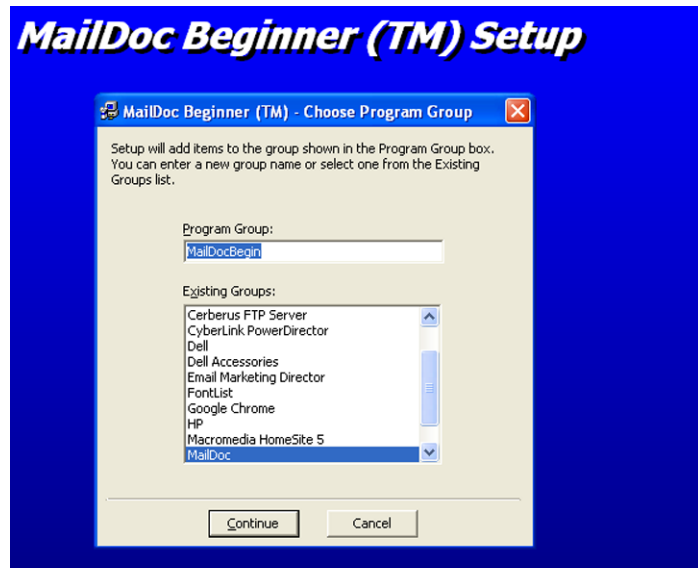
1. Insert MailDoc software disk into CD Drive. (If the disk does not autorun open the CD Drive and select Setup.exe). MailDoc Beginner Setup will open, close any applications running and press “OK” to begin install.



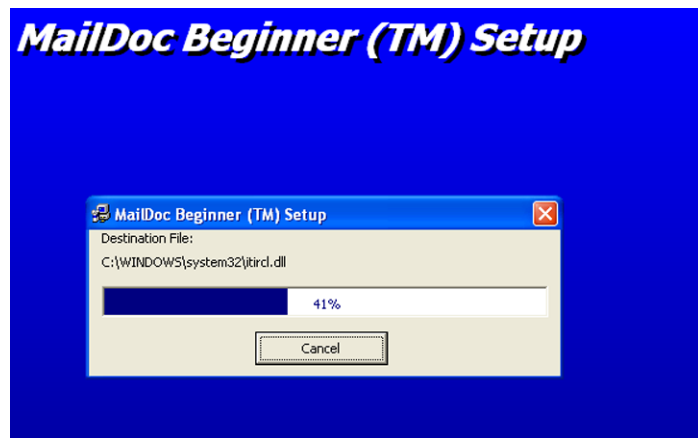
2. Select program directory and then press the computer icon to continue setup.



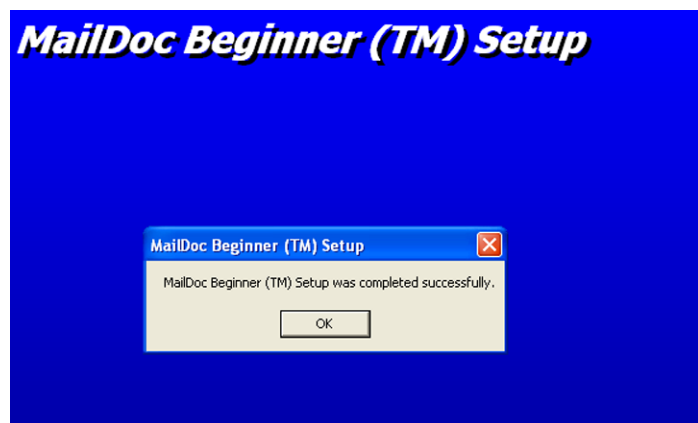
3. Select program group and press "Continue"



4. Installation will begin.

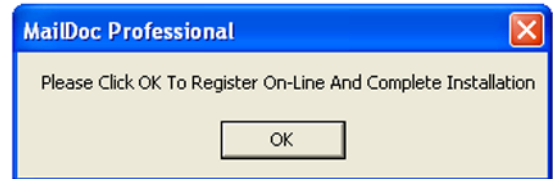


5. Press "OK" when installation has completed to begin using MailDoc Beginner.



PRODUCT REGISTRATION

To begin using MailDoc Beginner the product must be registered with the Serial Number provided. When first opening MailDoc a registration prompt will be displayed, click "OK" to continue.



Fill out the required registration information and click "Register" to send the information. Upon successfully completing the registration MailDoc Beginner will be ready for use and a confirmation e-mail will be sent.

A larger dialog box titled "MailDoc Registration" with a blue header bar and standard window controls (minimize, maximize, close) in the top right corner. The form is organized into three sections: "Registration" with fields for "Serial Number:", "Your Name:", and "Your Email:"; "Company Information" with fields for "Company Name:", "Phone Number:", "Address 1:", "Address 2:", "City:", "State:", "ZIP code:", and a "Country:" dropdown menu currently set to "United States"; and "Contact Information" with fields for "Contact Name:" and "Contact Email:". At the bottom right, there are two buttons: "Register" and "Cancel".

ABOUT MailDoc™ Beginner

MailDoc™ Beginner adds OMR or BCR marks to your PDF documents, invoices and statements which are required by OMR/BCR enabled folder-inserters. These OMR/BCR marks tell the folder-inserter which documents go together for mailing based on a single identifier. With this software, you can create and save a configuration file or Templates for commonly used documents, enabling re-use of these configurations for commonly performed tasks.



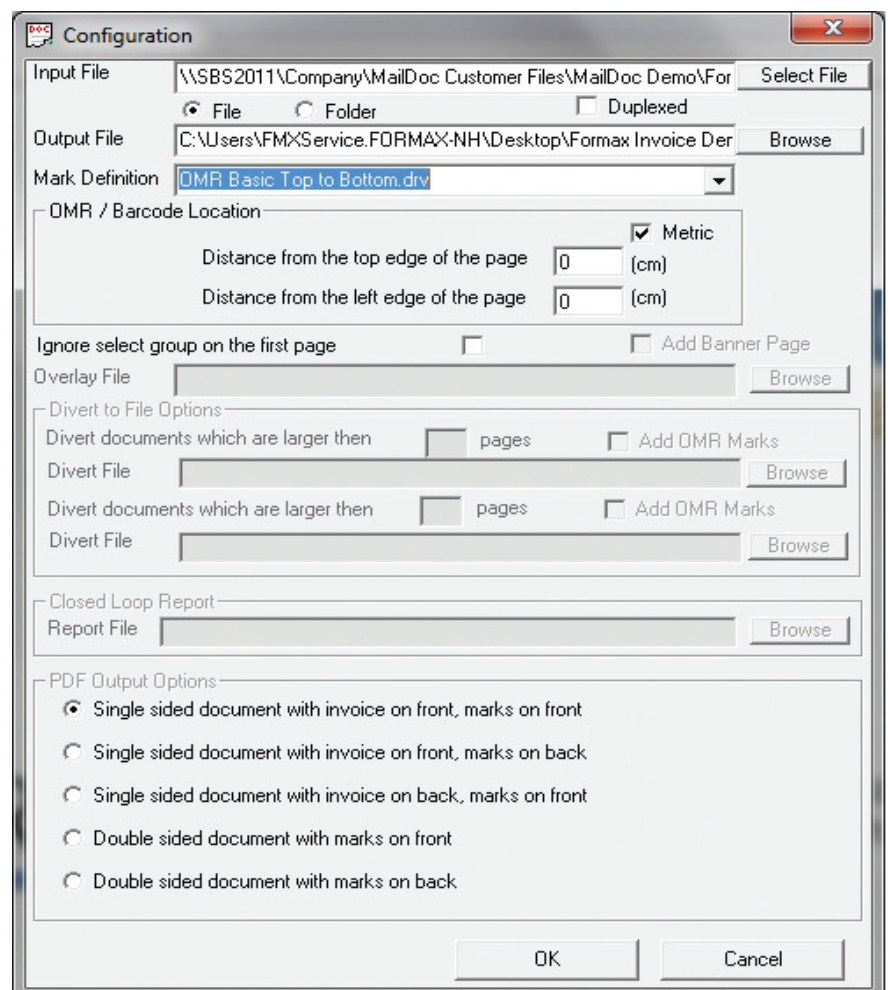
ADDING MARKS TO THE FILE

Select File/New to create a new job or File/Open to open a previously saved job or template.



File vs Folder Option for Input File:

- MailDoc can import PDF's via two different methods **File** and **Folder**. The file option is used to import a single PDF file (single pdf containing multiple pages to be grouped/sorted). The folder option, allows you to select a given folder that contains multiple individual PDF files that contain the same formatting (each PDF is for an individual customer). MailDoc will then merge and group all of these individual PDF files into one combined PDF with the OMR/BCR marks printed on them.
- The Duplexed check box is used if the PDF File that is being imported is also set up for duplex printing.



You will also need to enter the following information:

- **Output File:** Enter the filename and location for your processed PDF documents with OMR/BCR added.
- **Mark Definition:** Contains the options of which type of OMR/BCR will be applied to the document, based on the inserter feeding direction.

Mark Definition Options:

“BCR Basic Bottom To Top.drv”:

“BCR Basic Top To Bottom.drv”:

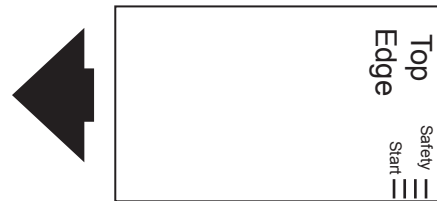
“OMR Basic Bottom to Top.drv”:

“OMR Basic Top to Bottom.drv”:

Top to bottom reading



Bottom to top reading



NOTE: The underlayed driver listed in the configuration is used when there is not enough clear space to place OMR/BCR marks on the document. Using the underlayed driver creates a white space around the marks to ensure the inserter can properly read the code. (Each inserter type has specifications for clear space around the OMR/BCR marks. Please see the operator manual for your inserter for additional information on space needed.)

Top to bottom is the more common reading direction. In most cases the top edge of the form is leading, using the top to bottom orientation. In cases when the top edge of the form is trailing the bottom to top mark orientation is needed.

- **OMR/Barcode Location:** This determines where the marks will be physically located on the documents.

PDF Output Options:

- Informs MailDoc where you would like the OMR/BCR Marks placed on the generated PDF output
 - Single Sided Document with invoice on front, marks on front
 - Single Sided Document with invoice on front, marks on back
 - Single Sided Document with invoice on back, marks on front
 - Double Sided Document with marks on front
 - Double Sided Document with marks on back

When you have made your selections, click "OK" to display imported document.

The screenshot shows the 'frmDocumentPDF' application window. At the top, there is a 'Page' control with a left arrow, a text box containing '1', and a right arrow. To the right is a 'Grouping Criteria' section with three radio buttons: 'Repeating Value' (selected), 'Start Text', and 'End Text'. The main content area displays an invoice for 'Formax OMR/BCR' with address '44 Ventures Drive, Dover, NH 03820, USA'. The invoice number is '78381' and the customer is 'ABC CO'. The 'Bill To' and 'Ship To' addresses are for 'ABC COMPANY' at '1 UNIVERSAL LANE, CONCORD, NH 03320'. Contact information for 'RICHARD DAVIS' is provided. Shipping details include 'Ship Via: YELLOW', 'I.O.B', 'Terms: NET 30 DAYS', and 'Salesperson'. The window title bar is blue with the text 'frmDocumentPDF'.

SELECTING THE GROUP FIELD

Once your document opens, you will need to select your group field. The group field is the unique information used to determine where a document begins and ends. In this example, the group field is the invoice number. The folder-inserter will know the previous document is complete when it sees a new invoice number.

Select the grouping field by clicking and holding the right mouse button at the top, left corner of the information to be selected, and dragging and releasing the mouse button at the bottom, right corner of the information. A black box will appear around the selected field. The text in the box will be displayed in red.

This screenshot shows the 'Select Group' dialog box overlaid on the same invoice document. The dialog box has a title bar 'Select Group' and the same 'Page' and 'Grouping Criteria' controls as the previous window. The 'Invoice No.' field, containing '78381', is highlighted with a red border and red text, indicating it is the selected group field. The invoice content is visible in the background, showing the same header and body information as the previous screenshot. The window title bar is blue with the text 'Select Group'.

GROUPING CRITERIA

Grouping criteria can be used when a repeating value is not present on each page. For example, if there is no invoice number available, a date, salutation or page number that is present only on the first or last page of a document can be used to separate each set. In the sample below the page number is used. In this case a box is drawn around the page # field on the document, "Start Text" is selected and "Page # 1" is typed into the "Match Text" field (Note: the "Match Text" field is case sensitive.).

Grouping Methods:

- **Repeating Value:** Is used when the identifier to be used is a unique character string (i.e. invoice#, customer#, Acct#, etc.) that is in the same location on every page. MailDoc will read what is in this box location on every page of the file, and group the all pages of the same character string together.
- **Start Text / End Text:** This is used when there are no common identifiers on every page of the set.
- **Start text** is used to inform MailDoc that whenever the character string in the box you drew is seen in the same location, that it is the first page of the set. Any other pages following that do not have this specific identifier in the same location will be considered part of the same set until the identifier is seen again. Once seen, the previous set is completed and the next set is started.
- **End Text** functions very similar to start text, the only difference is that End text tells MailDoc what is considered the last page of the set.

The screenshot shows the 'frmDocumentPDF' application window. At the top, there is a 'Page' field with a value of '1'. To its right is the 'Grouping Criteria' section, which is circled in black. This section contains three radio buttons: 'Repeating Value' (unselected), 'Start Text' (selected), and 'End Text' (unselected). To the right of these radio buttons is a text input field labeled 'Match Text' containing the text 'Page # 1'. Below this interface is a preview of an invoice document. The document header includes 'YELLOW', 'Invoice Date 08/12/2009', 'Order Date 08/12/2009', 'SO #', 'Ordered By', 'PO #', and 'Repaid #'. The main body of the invoice is a table with columns for 'Order Quantity', 'Shipped Quantity', 'Tax', 'Item Number', 'Item Description', 'Unit Price', and 'Extended Price'. The table lists several items, including 'SAFETY COVER' and 'CLUTCH HANDWHEEL BASE PLATE'. At the bottom of the document, there is a 'Print Date 08/13/2009', 'Print Time 02:32:13 PM', and a 'Page 1' label. A payment instruction is also present: 'Please Make Payment to: Foxmax OMR/BCR, 44 Ventures Drive, Dover, NH 03820, USA'.

Order Quantity	Shipped Quantity	Tax	Item Number	Item Description	Unit Price	Extended Price
1	1	F	393-8731	SAFETY COVER	5513	5513
1	1	F	385-0004	CLUTCH HANDWHEEL BASE PLATE	788	788
1	1	F	393-8731	SAFETY COVER	5513	5513
1	1	F	385-0004	CLUTCH HANDWHEEL BASE PLATE	788	788
1	1	F	382-0009	HOOK VELCRO PAD	1.69	1.69
1	1	F	393-8731	SAFETY COVER	5513	5513
1	1	F	385-0004	CLUTCH HANDWHEEL BASE PLATE	788	788

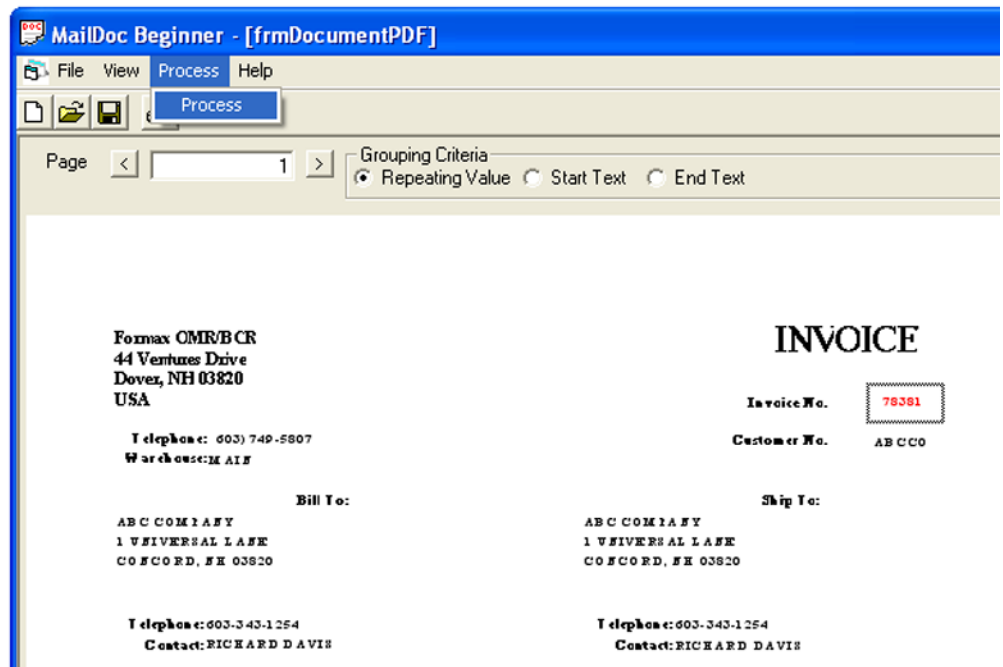
SAVING YOUR SETTINGS

You can save your job by using the “File/Save”, “File/Save As” or “File/Save Template” options. “Save” or “Save As” will save the file with all OMR/BCR settings along with input and output file settings. “Save Template” saves just the OMR/BCR settings without the input and output settings for use with other input and output files, eliminating steps and saving time for recurring jobs that have the same layout but with different data.

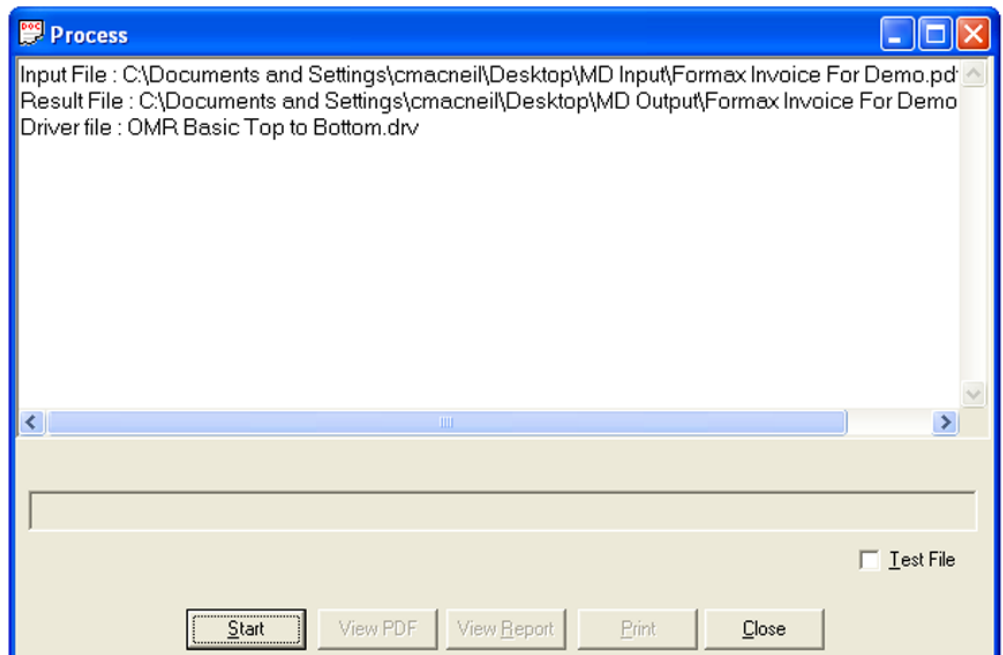


PRODUCING THE MARKED DOCUMENT

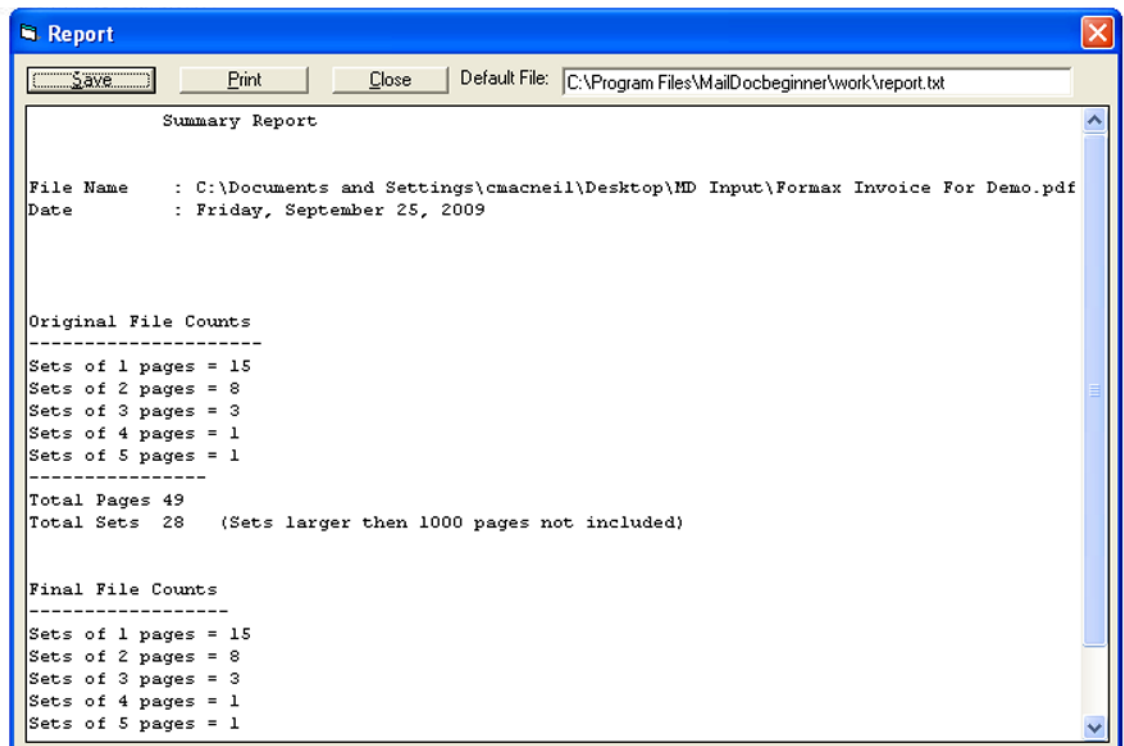
To process your document, select Process from the menu bar.



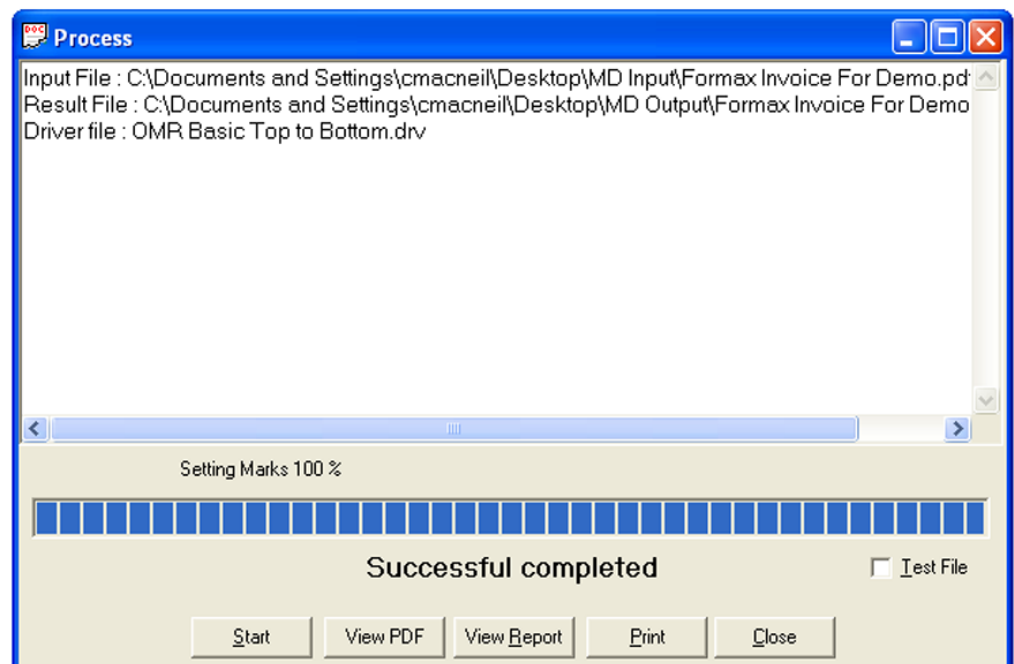
Once the Process screen appears, you can click Start to generate the appropriate marks in the output file. Selecting the Test File check box will generate comments beside each mark describing the marks' instruction.




The Summary Report will appear on the screen once the file has been processed and marks have been added. The Summary Report for this job is displayed below. The report can be printed and/or saved. Close the screen when finished.



From the Process screen the PDF of the processed file can be viewed by pressing the "View PDF" button.

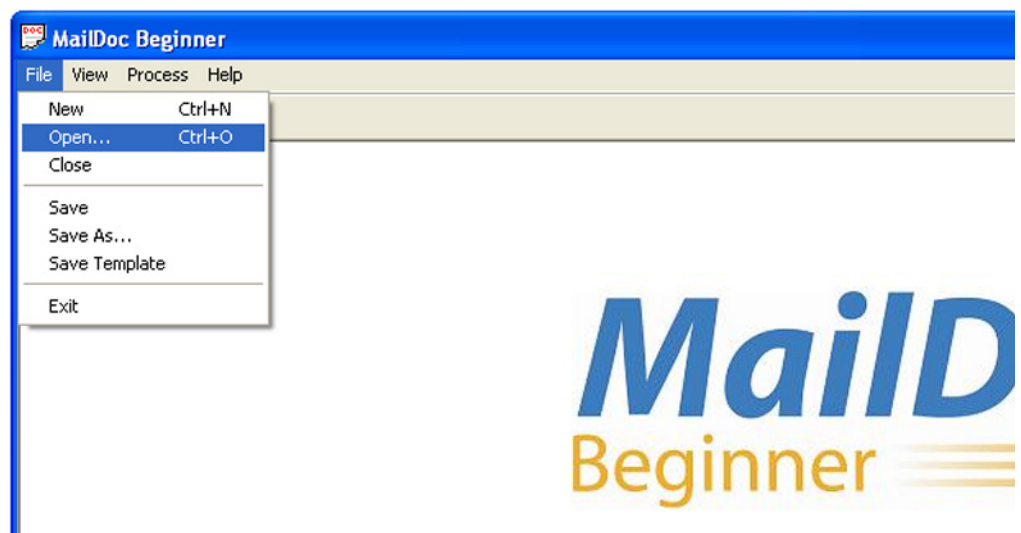


The top of the sample PDF output file is shown below. The marks added by the software have been highlighted.

	Formax OMR/BCR 44 Ventures Drive Dover, NH 03820 USA	INVOICE			
	Telephone: (603) 749-5807 Warehouse: MAIN	<table border="1"><tr><td>Invoice No.</td><td>78381</td></tr><tr><td>Customer No.</td><td>ABCCO</td></tr></table>	Invoice No.	78381	Customer No.
Invoice No.	78381				
Customer No.	ABCCO				
Bill To:		Ship To:			
ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820		ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820			
Telephone: 603-343-1254 Contact: RICHARD DAVIS		Telephone: 603-343-1254 Contact: RICHARD DAVIS			





Opening Saved Files and Templates

To open a saved file or template, select “Open” from the File Menu.



OMR MARK POSITIONS

This processed "Test File" PDF displays the name of each mark listed next to the mark. This example shows basic OMR laid out top to bottom.


<p>  Start  Accumulate/Insert  Parity  Safety </p> <p> Formax OMR/BCR 44 Ventures Drive Dover, NH 03820 USA </p> <p> Telephone: (603) 749-5807 Warehouse: MAIN </p>	<h3>INVOICE</h3> <table border="1"> <tr> <td>Invoice No.</td> <td>78381</td> </tr> <tr> <td>Customer No.</td> <td>ABCCO</td> </tr> </table>	Invoice No.	78381	Customer No.	ABCCO
Invoice No.	78381				
Customer No.	ABCCO				
<table border="1"> <tr> <td>Bill To:</td> </tr> </table> <p> ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820 </p> <p> Telephone: 603-343-1254 Contact: RICHARD DAVIS </p>	Bill To:	<table border="1"> <tr> <td>Ship To:</td> </tr> </table> <p> ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820 </p> <p> Telephone: 603-343-1254 Contact: RICHARD DAVIS </p>	Ship To:		
Bill To:					
Ship To:					

MARK DEFINITIONS

Start	On every page, defines the beginning position of the OMR code.
Accumulate/Insert	Determines if additional pages are to be pulled or if the set is complete. No mark present = Accumulate; Mark present = Insert.
Parity	A parity mark ensures that the number of marks on the page are even.
Safety	On every page. Provides extra security, primarily used for paper skew, if the safety mark is not read an error code will be displayed on the inserter.

BCR MARK POSITIONS

This processed example shows basic BCR laid out top to bottom.

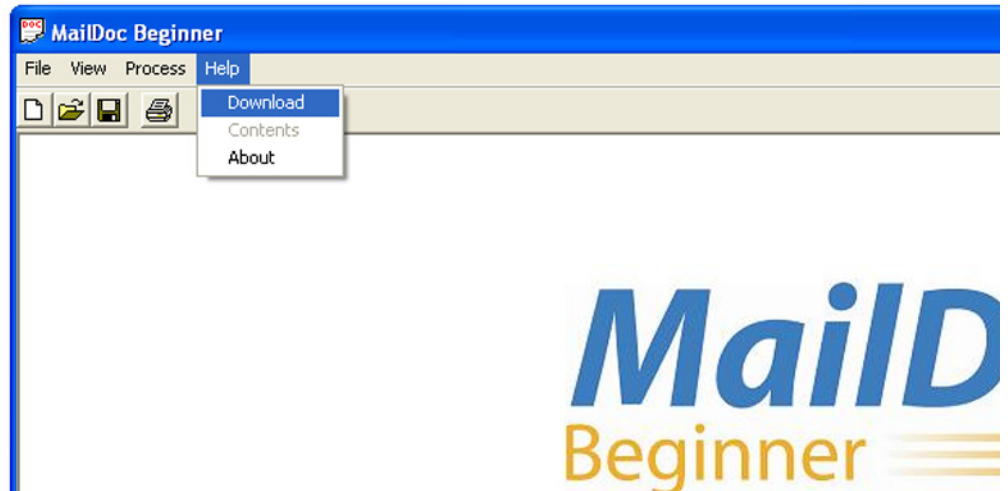
<p>Formax OMR/BCR 44 Ventures Drive Dover, NH 03820 USA</p> <p>Telephone: (603) 749-5807 Warehouse: MAIN</p>		<h2 style="margin: 0;">INVOICE</h2> <table border="1" style="margin: 10px auto;"> <tr> <td style="background-color: #00A0C0; color: white;">Invoice No.</td> <td style="text-align: center;">78381</td> </tr> <tr> <td style="background-color: #00A0C0; color: white;">Customer No.</td> <td style="text-align: center;">ABCCO</td> </tr> </table>	Invoice No.	78381	Customer No.	ABCCO
Invoice No.	78381					
Customer No.	ABCCO					
Bill To:	Ship To:					
<p>ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820</p> <p>Telephone: 603-343-1254 Contact: RICHARD DAVIS</p>		<p>ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820</p> <p>Telephone: 603-343-1254 Contact: RICHARD DAVIS</p>				

MARK DEFINITIONS

N of M	Security feature that ensures the correct number of sheets are accumulated and inserted. N = the sheet # and M = the # of sheets in each set. If N is less than M another sheet is pulled, if N is equal to M the set is complete and inserted, and If N is great than M a sequence error is generated and the group is diverted.
Insert	An insert mark has the inserter feed a sheet from the station specified.
Accumulate	An accumulate mark indicates that a set is complete and is ready to be inserted.

Product Updates

Product updates are available periodically to enhance the product performance. To access updates, a password must first be obtained through Formax. Press the Help button and select “Download” from the drop down menu.



Enter the password and follow the on-screen directions to complete the download.

